

## **Sales Operations Coordinator – 1 Year Term**

**Conquest Planning** is a rapidly growing company in the financial technology space. In fact, we were the only Canadian Fintech to be included on the 2023 CB Insights Fintech 100 list. Our innovative financial planning tool empowers users by making it simple to improve their client's financial outcomes using our highly intuitive UX. Our Mission is to one day make great financial advice available to everyone and improve financial literacy around the world. We are based out of Winnipeg, Manitoba and have team members located across Canada, the United States, and the United Kingdom.

We are seeking a **Sales Operations Coordinator – 1 Year Term** to join our dynamic team! This is a fully remote / work from home opportunity. Extension of the length of the Term is a possibility as well as other opportunities with the Company when the Term assignment concludes.

As **Sales Operations Coordinator** reporting to the Director, Sales Operations, you will be responsible for performing sales related administration, including the onboarding of new customers, and supporting and leveraging the capabilities of Salesforce. The Sales Operations Coordinator will be passionate about customer service and meticulous with details and quality which will support the effective implementation of the Conquest Planning tool. The coordinator will work with several internal teams to deliver support to our end-users and will lead and contribute to various projects.

### **Duties of the role include:**

- Monitoring daily inbound requests for support in the Salesforce and Brand Management queues via email and phone.
- Assisting customers with branding updates, changing logos, colours, adding or deleting users or administrators.
- Supporting customers with password resets and building organization structures within the Conquest tool.
- Leveraging the capabilities of Salesforce to improve efficiencies, build reports, and enter or update data on behalf of the sales team.
- Electronically prepares documents, presentations and spreadsheets involving business and technical terminology pertaining to confidential matters of a high importance.
- Building customer good will and relationships through accurate entry of information, timely responses to requests, and effective presentations that reflect user requests and requirements.
- Working with all internal teams to help ensure on-boarding tasks are carried out promptly, accurately and in the right sequence.
- Proactively communicating with internal and external stakeholders when issues arise.
- Keeping current with trends within the financial planning and fintech industry.

- Entering accurate data in Salesforce or / or running requested reports for management
- Carrying out various tasks in support of the Sales and Customer Success teams
- Leading and contributing to various projects as assigned.,

**Qualifications required:**

- 2 - 4 years of customer service or account management experience in financial services or a software company.
- Proficient with MS Office Suite
- Salesforce experience preferred
- Proven track record of success in a customer facing role.
- Exceptional communication skills (oral, written and presentation skills)
- High level of organizational ability, accuracy and attention to detail
- Experience building and maintaining relationships, while working to drive engagement.
- Empathetic, positive attitude with a desire to help our customers reach their goals.
- Passion for technology and for being a part of a fast-growing company.
- Experience working with cross-functional teams (e.g. Sales, Product, Marketing, Services)
- Experience working with, and managing, stakeholders and customers.
- Flexible approach, able to operate effectively with uncertainty and change.
- Driven, self-motivated, enthusiastic, and collaborative team player.
- Natural curiosity towards learning and broadening personal knowledge base
- Quick learner
- Familiarity with project management/coordination best practices and agile methodologies an asset

**What to expect:**

- An inclusive culture comprised of extremely talented individuals.
- A leadership team with a proven track record of success.
- The opportunity to join a company as it expands across the globe.
- Competitive compensation and generous benefits

**How to Apply:**

We're excited to learn about you and want to give you the opportunity to set yourself apart from everyone else. Along with your Resume, send us a personalized Cover Letter, Email or Video with the following:

- Why you are interested in this job, the fintech industry, or any other reason you would like to work with us.

**Next steps:**

If this exciting opportunity is of interest to you, please forward your application by **March 22, 2024**, as described above with **Sales Operations Coordinator- 1 Year Term** in the subject line to [human.resources@conquestplanning.com](mailto:human.resources@conquestplanning.com)

We thank all applicants for their interest. Only those invited for an interview will be contacted.

Conquest Planning Inc. is an equal opportunity employer. Our inclusive work environment welcomes diversity and supports accessibility. If you require accommodation at any time during the recruitment process, please contact [Human.resources@conquestplanning.com](mailto:Human.resources@conquestplanning.com) .